FINANCIAL CHECKLIST

MAKE A NEW YEAR'S RESOLUTION TO KEEP YOURSELF ACCOUNTABLE AND MAKE YOUR GOALS A REALITY

DEADLINE

INCREASE RETIREMENT CONTRIBUTIONS

If you have a group retirement plan from your employer, make sure to contribute to it each year. Plus, many employers offer a generous match based on your contributions.

MAXIMIZE TAX SAVINGS

There are a few strategies to consider that may benefit you for the tax season and the new year.

- Make charitable donations
- Look into saving with a Traditional or Roth IRA plan

EVALUATE AND/OR PURCHASE YOUR INSURANCE COVERAGE

Did anything big happen this year? Get married? Had a baby? Bought a house? Started a business? If so, your current insurance coverage may not be enough to cover your needs in the new year.

I can provide you a complimentary life insurance quote. Reach out today!

REVIEW YOUR FINANCES

Now is the perfect time to review your budget. Assess your spending habits and check savings accounts to see if you need to make any adjustments.

Scan for more information

UPDATE BENEFICIARIES

It is important to make sure you have a beneficiary listed with each of your accounts. Go through and check that you have someone designated on each account.

SCHEDULE A FINANCIAL REVIEW

Worried that you're not on the right track? Call your financial advisor and set up a time to talk. A financial advisor can guide you through the steps for setting up a solid financial plan that is tailored to your goals. The first call is always complimentary.

THE Legend GROUP

REACH OUT
to set up a consultation
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